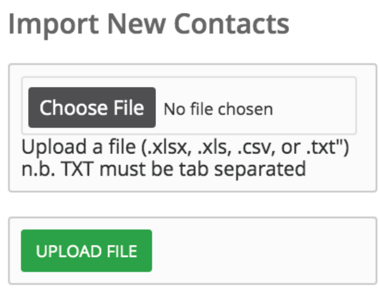
Quick Start Guide
For Accounting & Finances

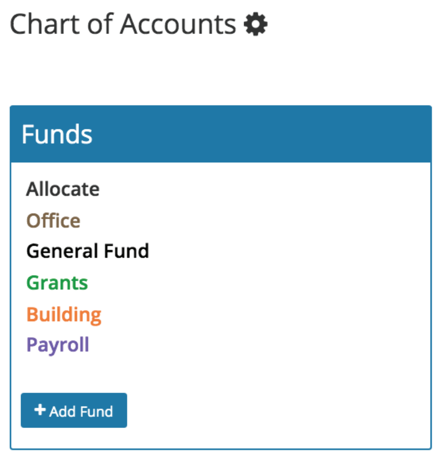
Welcome to Aplos! Below is a list of recommended steps to help you get started. Each step provides a resource that covers the process in more detail. If you have any questions, contact our award-winning Support Team at (888) 274-1316 or aplos.com/support.



Step 1: Add Your People

It's easy to import contacts in Aplos! If you have an Excel file of your donors and/or vendors, along with their contact information, our contact import tool can quickly bring those details into your account.

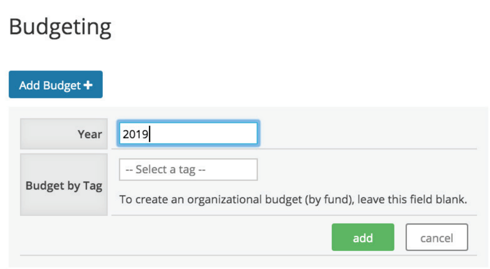
vwww.aplos.com/support/articles/importing-contacts



Step 2: Edit Your Chart of Accounts and Set Your Starting Balances

By default, you have a basic chart of accounts that you can edit to reflect your preferred structure. You'll want to set the starting balances for any of your asset or liability accounts so your register balance matches your bank. These starting balances should match your bank account as of the first transaction you enter in Aplos.

www.aplos.com/support/articles/nonprofit-chart-accounts/
www.aplos.com/support/articles/coa-setup



Step 3: Create Your Budget

Setting up your budget will help you project income and expense goals for your fiscal year. As you enter transactions, you can run budget reports to see if you're spending and/or revenue are matching your goals.

www.aplos.com/support/articles/budgeting

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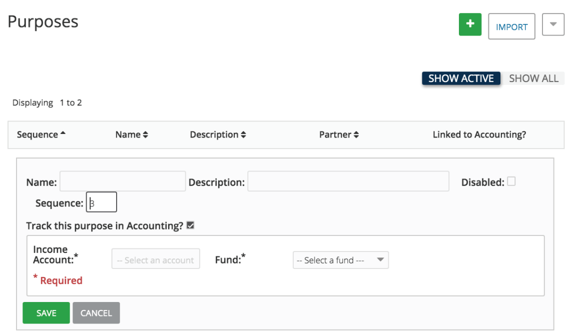
Step 4: Create and Link Your Purposes

To track donations and prepare contribution statements in Aplos, you need to create purposes in the Donations section. You can then link those purposes to the related accounts in your accounting if you want your contribution deposits to also post in the bookkeeping.

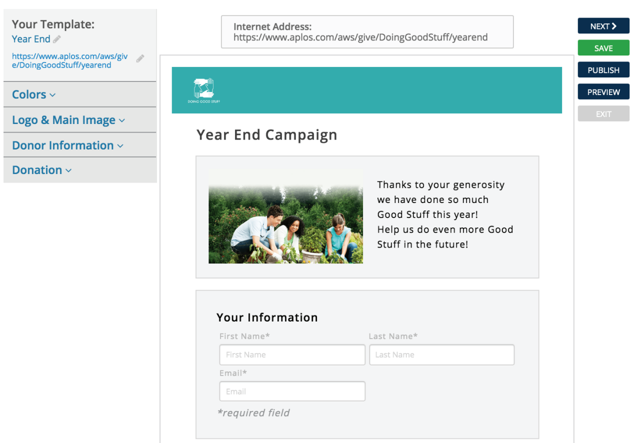
www.aplos.com/support/articles/purposes



Step 5: Online Donation Form

Giving people a recurring donation option will help keep your donations more predictable. Once you create your Aplos online donation form, you can share it with your supporters or add it to your website so people can set up a weekly or monthly recurring gift to your organization.

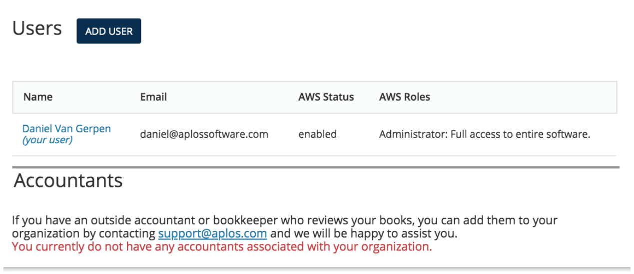
www.aplos.com/support/articles/online-donations

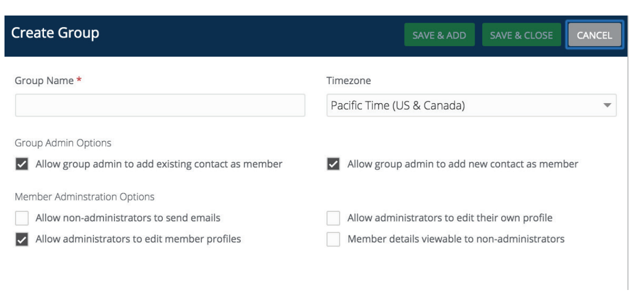


Step 6: Invite Other Users

You can share access with the rest of your team by adding them as users with role permissions in the Settings section. You can also create a Group or Team for your board or volunteers from any contact in your People section and invite them to a private group portal to schedule meetings, share documents, and sign up for volunteer opportunities.

www.aplos.com/support/articles/settings-adding-managing-users
www.aplos.com/support/articles/groups-and-teams-getting-started





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